
Clean Energy for Low Income Communities Accelerator**Overview**

This document is provided as a planning tool for partners in the Clean Energy for Low Income Communities Accelerator (CELICA). Many partners will publish objectives, strategies, and proposed actions through more extensive reports or official recommendations. Others may choose to use an internal strategy document such as the CELICA Action Plan template to help guide progress. If other planning documents are used, please include the following information for each of the key proposed activities that you plan to develop with support from the Accelerator.

- **Target sectors:** identify who the activity will be serving (e.g., single family owners at or below 200% federal poverty level or 80% area median income)
- **Objectives:** identify what the activity aims to accomplish
- **Key planned activities:** identify the critical actions that will be needed to successfully meet objectives
- **Impact metrics:** identify metric(s) to set measurable goals and track progress against, such as
 - # of low income homes to be served
 - \$ targeted/budgeted for low income clean energy programs, and \$ leveraged
 - % average energy burden reduction anticipated
 - MWh and MCF and/or other total energy savings
 - MW of low income community solar, rooftop solar, and any other clean energy installed for low income communities
 - Co-benefits (# of low income residents trained for jobs, # jobs created, with health & safety issues abated, GHG emission reductions, etc.)

The suggested timeline for a working draft of the action plan is May 2017. A significant portion of the in-person Better Buildings workshop will be focused around partner actions plans. Small group discussions will center on implementation steps of the proposed actions that have been identified to meet objectives. However, action plans are often viewed as living documents that go through multiple iterations based on stakeholder feedback, and it is expected that these plans may continue to change or expand after May 2017.

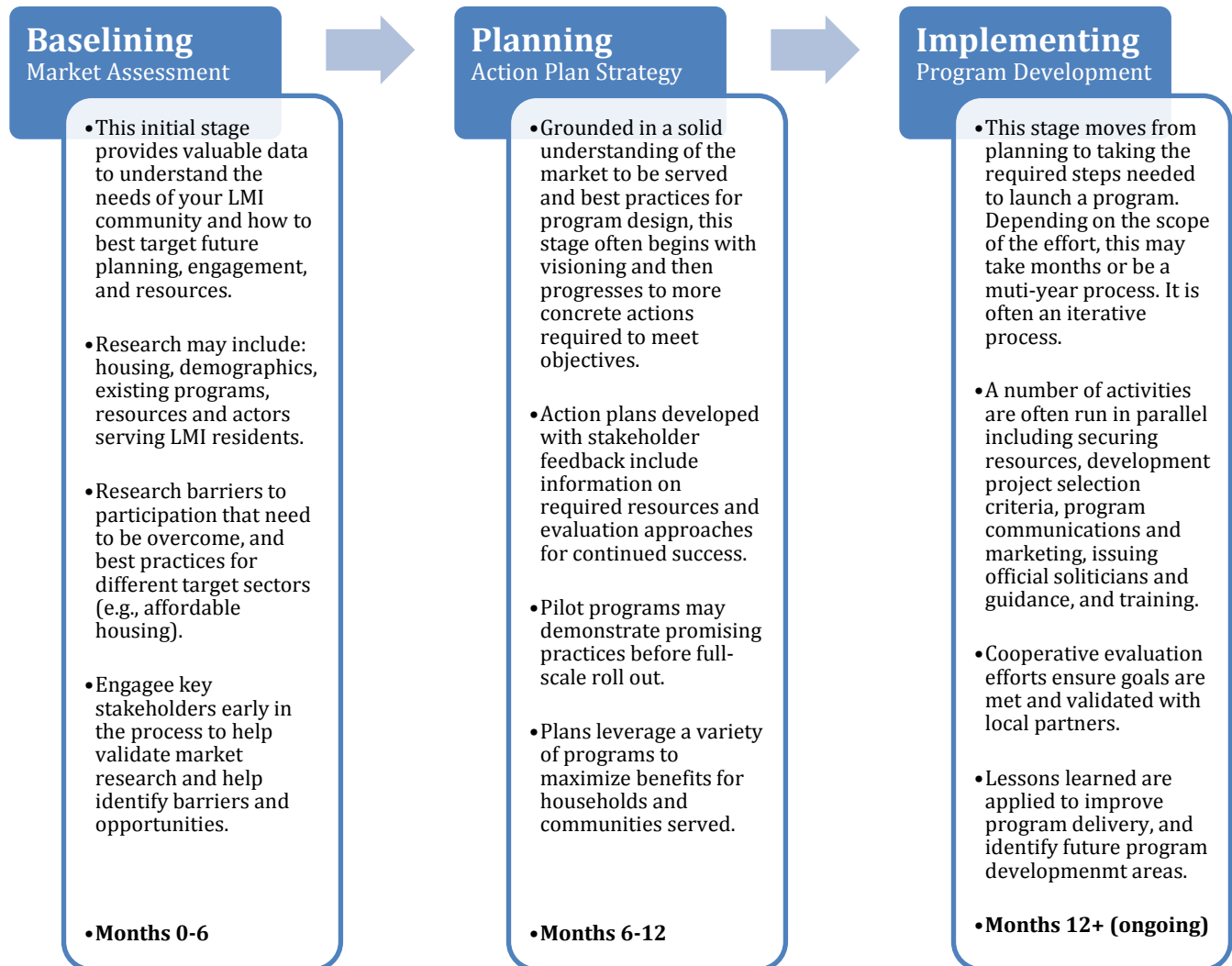
Please note that these plans will be shared with other partners, and some portions may be included as part of communications to policymakers and the general public about progress made in the Accelerator. An Action Plan Guide with helpful examples and tips for partners on how to best fill out action plans is included at the end of this template.

Stages of Planning Process: Baseline, Planning, Implementing

Partners in the Clean Energy for Low Income Communities Accelerator are actively working to create a program, pilot demonstration or scalable initiative that will enable increased access to clean energy options by low and moderate income (LMI) households and communities. This type of effort typically goes through multiple steps and requires understanding the needs of LMI households and engaging with stakeholders across many sectors. An assessment of the low

income market (i.e., demographics and service barriers, and program needs and gaps) should inform stakeholder conversation, and feedback from stakeholders should help identify the most impactful strategy and set of actions.

Although the key milestone for Year 1 of the Accelerator is the development of an action plan, the initial two stages are critical to a successful and well-grounded action plan. It is better to take the necessary time to baseline and engage stakeholders, and reach the action plan stage at a later date than skip the earlier stages. The suggested stages and timeline are outlined below.



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Program/Initiative Name (or Agency and portfolio name):						
Mission Statement:				Measures of Success for Program/Initiative:		
LMI Community Defined as:				Target Sector(s):		
Objective #1:						
Objective Summary:				Target Sector:		
				Identified Need(s) Being Met:		
				Success Indicator(s):		
Action Step	Target Date	Resources Required	Source of Resources	Key Partners & Roles	Point of Contact	Status
Objective #2:						
Objective Summary:				Target Sector:		
				Identified Need(s) Being Met:		
				Success Indicator(s):		
Action Step	Target Date	Resources Required	Source of Resources	Key Partners & Roles	Point of Contact	Status
Objective #3:						
Objective Summary:				Target Sector:		
				Identified Need(s) Being Met:		
				Success Indicator(s):		
Action Step	Target Date	Resources Required	Source of Resources	Key Partners & Roles	Point of Contact	Status



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CELICA Action Plan Guide

CELICA Workplans are a work in progress. The CELICA team has developed this Guide based on the Workplans that were submitted in 2017. In this Guide, you can find tips and examples of how to improve information in your own workplan.

We hope you find this helpful to planning and communicating your plans for low to moderate income energy efficiency and renewable energy programs.



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Action Plan Component	Do's and Don'ts	Examples
<p>Mission Statement:</p> <p>A Good Mission Statement provides a vision for where you want to be in the future.</p>	<p>Do: Begin with a broad statement like, "Imagine a world in which..." or "Make it easier for..."</p> <p>Don't: Get bogged down in the details or the actions that will be required to achieve the vision.</p>	<p>"Make it easier for LMI residents to take full advantage of the shift to clean energy through a variety of initiatives."</p> <p>"To increase accessibility and uptake of energy efficiency and renewable generation source installations in low and moderate income communities."</p> <p>"Increase low-income access to clean energy and expand investment in disadvantaged communities to continue economic growth and strengthen resilience."</p> <p>"Build wealth in low-income neighborhoods by developing, promoting, and supporting a diverse portfolio of worker-owned businesses."</p>
<p>LMI Community Defined as:</p> <p>Define the community by neighborhood or resident income level. Define income relative to local median and/or other measures vulnerable characteristics.</p>	<p>Do: Specify what the local, region or area median income is.</p> <p>Do: Specify the % of the poverty indicator you are using in your program.</p> <p>Don't: Express poverty as generically below the federal poverty threshold without providing more detail.</p>	<p>"Residences below 200% federal poverty level"</p> <p>"Moderate income is <100% area median income. We define <80% area median income as "affordable." Low income is defined as 200% of federal poverty level or 60% state median income."</p>



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Action Plan Component	Do's and Don'ts	Examples
Target Sector(s): This identifies who the activity will be serving. A good target is clear, not general.	Do: Specify which type of housing units. Don't: Target a technology area because sector refers to who will be served by this program. Don't: Specify say "LMI community" without defining what that is.	"Single-family, Multi-family of 4 or less units, small business" "All public housing owners (Housing authority, landlords)" "Seniors" "Families with children" "Families with disabled residents"
The Objective Summary: This identifies what the activity aims to accomplish. It should explain: Who, What, Where, Why, When and How about each objective.	Do: Tie the Objectives to the program and mission. Do: If you identify timing, provide reason for the timing.	"Partner with County and local public housing authority to roll out Wx & solar program" "Build the city's solar economy through bulk buying, consumer protections, municipal government support, job training and subsidy for LMI households."
The Key Planned Activity/Action Steps: This identifies the critical actions that will be needed to successfully meet objectives. While it may seem ambiguous, there will be times when it is necessary for the action step's purpose is to explore an idea.	Do: Say what you will do and when. Don't: If the objective is job creation, then don't provide details that don't pertain to the activity.	<ul style="list-style-type: none"> • " Create pilot program guidelines (December 31, 2017) • Contract(s) and MOU(s) (January 15, 2018) • Identify potential project sites (February 1, 2018) • Secure landlord participation and agreement in place (April 1, 2018) • PV Installation begins (May 1, 2018)"



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Action Plan Component	Do's and Don'ts	Examples
<p>The Target Date:</p> <p>This may include one target date or a series of iterative steps. If some activities run in parallel, this must be expressed. If the action step's purpose is to explore an idea, it may not be possible to determine this date at the outset of the Action Plan.</p>	<p>Do: Express which parts of the Action Plan will be accomplished during the CELICA timeframe.</p> <p>Do: If the timeframe is unknown, say so.</p> <p>Do: If there are multiple components of an Action Step, provide as many corresponding target dates as possible.</p>	<ul style="list-style-type: none"> • "Action Step – target Date • Identify partners - Done • Select buildings – Done • Audit – May 9 • Engineering and data collection - June • Financing and incentives - June • Contracts signed - July • Phase I energy conservation measures – July-August • M&V and analysis – Sept - Dec • Phase II energy conservation measures – Jan – March 2018 <p>Evaluation and scale – July 2018"</p>
<p>Resources Required:</p> <p>Demonstrate the quality of your stakeholder feedback and include details on what is needed.</p>	<p>Do: Seek input from stakeholders and partners.</p>	<p>"Ongoing technical assistance, vendor evaluation support, key partnerships with City Licenses & Inspections and Office of Sustainability and PECO"</p> <p>"Continued data from state and federal Wx programs"</p> <p>"Financing"</p> <p>"Funding"</p>
<p>Source of Resources:</p> <p>Include details on who can provide resources or where you will seek resources.</p>	<p>Do: Seek input from stakeholders and partners.</p>	<p>"DOE Solar in Your Community seed and technical assistance grant."</p>



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Action Plan Component	Do's and Don'ts	Examples
<p>Key Partners & Roles:</p> <p>Please note, this may not be possible to express until after the action step for the objective has started.</p>	<p>Don't: Provide only the type of organizations you wish to partner with, without providing the name of the organization.</p> <p>Don't: Say only the name of the organization without explaining the role of the organization.</p> <p>Do: Say the name of the organizations and their role.</p>	<p>"Family Independence Initiative: Connects head of household with resources to help them achieve economic mobility and self-sufficiency"</p>
<p>Point of Contact/Status</p>	<p>Do: If you have identified one, then provide name and organization.</p>	